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Foreign Crops and MARKETS



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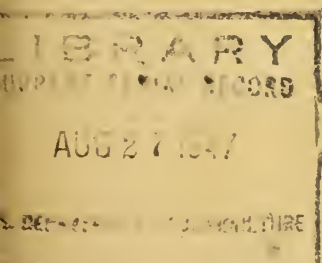
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L A T E N E W S

China's over-all rice crop outlook has improved. For China as a whole, summer rains have been more than sufficient. Summer crops in North China are generally near average condition, but drought in Shansi, rains in Shantung, and floods in North Kiangzu and South Manchuria have cut prospects in those areas. Assuming no deterioration in summer crops, it appears winter and summer food production in China will be noticeably larger than last year.

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The condition of the Yugoslavian grain crop continues good, and the grain is well developed, according to latest reports. Small grain were being harvested, and prospects for above-average corn yields were good at the time of the latest report if weather continued favorable.

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Belgium's meat supply situation may be expected to ease considerably within the next month or two, in view of the current elimination of the meat subsidy, and increased prices to farmers.

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India will receive 1,000,000 pounds of Japanese raw silk in exchange for lint cotton, according to reports in Bombay. No details have been given as to prices or qualities of either commodity involved in the exchange. India's silk requirements are estimated at 2,000,000 pounds. In addition to the supply from Japan, part of these requirements will undoubtedly come from China.

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Cotton consumption in Mexico is reported to have declined to 298,000 bales (of 500 pounds gross) in 1946-47 (August-July) from last year's total of 308,000 bales, and a further decline to around 265,000 bales is expected in 1947-48. Renewed competition in the textile export market is believed to be the principal reason for the decline.

The 1947 crop is estimated at 464,000 bales from 988,000 acres, indicating a lower yield than in 1946 when corresponding estimates were 462,000 bales from 843,000 acres. Exports during the nine months ended April 30, 1947 totalled 147,000 bales and were expected to reach 200,000 for the 1946-47 season, which is considerably less than the 1945-46 total of 263,000 bales.

Stocks on hand at the end of July, 1947 were estimated at 211,000 bales, compared with 253,000 a year ago. Current stocks

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GRAIN STOCKS ABOVE LOW LEVEL OF 1946

Larger corn stocks in the United States and Argentina increased grain stocks in the four principal exporting countries on July 1 to 49 million short tons, 20 percent more than on July 1, 1946. Stocks are still much below the 1944 and 1945 levels, however, according to information available in the Office of Foreign Agricultural Relations. Significantly, wheat, which is in great demand for shipment to deficit areas, is slightly less than the low 1946 low level. Stocks of rye and barley are slightly larger, but oats stocks are below a year earlier. The small wheat stocks are the result of the heavy export movement from the large crop in both the United States and Canada last season. Exports from these two countries for the year ended, June 30, 1947, were about 625 million bushels.

Carryover stocks of small grains in the United States were even less than the small stocks on July 1, 1946. Corn stocks, however, were about 37 percent larger than a year ago, which more than balances the reduction in small grains, and makes the net gain for all grains about 20 percent, compared with stocks a year earlier.

In Canada, the stocks were slightly above those of July, 1946 because stocks of wheat were higher. The increase in wheat stocks occurred despite the large exports, estimated at about 230 million bushels for the fiscal year ended June 30. Stocks of rye and barley were virtually unchanged, while oats showed some decline, compared with stocks a year ago.

Argentine grain stocks appear to be about 50 percent larger than those remaining in the country in July, 1946. The main increase is estimated for corn, which is about twice as large as a year ago. Stocks of wheat, rye and barley are also placed at a higher figure than in 1946.

Grain stocks in Australia were approximately 17 percent smaller than in 1946, with wheat stocks estimated to be only 56 million bushels, compared with the small stocks of a year ago, placed at 68 million bushels. The total supply of wheat at the beginning of the crop year (December 1) was about 11 percent below that of a year earlier.

Considering the grains separately, wheat stocks in the four countries, estimated at 379 million bushels, are 8 million below 1946 and appear to be the smallest July 1 stocks since 1938. In 1945 stocks were 818 million; in 1944 they were 1,164 million bushels. In the United States, heavy exports in 1946-47 reduced stocks to only 83 million bushels, or about one-fourth of the 1944 stocks. Canadian stocks of 115 million bushels are above 1946, but only 30 percent of 1944. The Argentine stocks are slightly above a year earlier, and about 40 percent of 1944. They amount to 125 million bushels. The Australian stocks are about 35 percent of 1944.

Rye stocks are placed at a higher figure than a year ago, as a result of the near-record crop in Argentina. Stocks of rye in the United States and Canada are unchanged from the low level of a year ago.

Increased barley stocks in Argentina more than balance slight increases in the Northern Hemisphere countries, and total stocks are estimated to be about 10 percent larger than in 1946.

Stocks of oats in all four countries are estimated to be smaller than they were a year ago. Though slightly smaller than a year ago, stocks of oats in the United States were still above average while stocks in other countries were smaller than the average of recent years.

The significant rise in corn stocks results mainly from the increase in the United States stocks remaining from last year's record crop, which was placed at 727 million bushels, 37 percent larger than in 1946. Larger holdings in Argentina also contributed to the increase. That country's stocks, as estimated at 250 million bushels, are double the stocks of a year ago.

GRAINS: Estimated stocks in the principal exporting countries, July 1, 1947 with comparisons

Country and year	Wheat	Rye	Barley	Oats	Corn	Total 1,000 short tons
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels	
United States						
1944	317	31	76	208	586	31,938
1945	279	12	95	234	754	35,842
1946	100	2	59	292	532	24,040
1947	83	2	56	278	727	28,694
Canada						
1944	398	6	65	a/ 145	b/	16,133
1945	314	3	44	a/ 140	b/	12,940
1946	104	1	41	a/ 108	b/	5,968
1947	115	1	40	a/ 95	b/	6,053
Argentina						
1944	290	15	24	45	310	19,096
1945	175	8	31	57	155	11,470
1946	115	8	25	35	125	8,334
1947	125	15	40	30	250	12,610
Australia						
1944	159	b/	5	12	b/	5,082
1945	50	b/	3	6	b/	1,668
1946	68	b/	6	15	b/	2,424
1947	56	b/	7	10	b/	2,008
Total						
1944	1,164	52	170	410	596	72,249
1945	818	23	173	437	909	61,920
1946	387	11	131	450	657	40,766
1947	379	18	143	413	977	49,365

Office of Foreign Agricultural Relations, USDA

Prepared or estimated on the basis of official statistics, reports of United States Foreign Service Officers, and other information. a/ Bushels of 34 pounds. b/ Production small, and stocks remaining believed negligible.

WORLD DRIED APRICOT PACK SLIGHTLY SMALLER THAN IN 1946

The 1947 preliminary estimate of dried apricot production in the United States, Spain, Australia and other leading commercial producing countries is 19,800 short tons, compared with 22,800 tons (revised) in 1946, and 13,200 tons in 1945.

This is 17 percent below the 5-year (1941-45) average of 23,900 tons, and 30 percent below the 10-year (1936-45) average of 28,200 tons.

Changes in production from that of a year ago in foreign countries was in no case large. The preliminary trade estimates for the United States indicate a decrease of about 3,000 tons. Production in Spain and Australia, the largest producers are down 100 tons each while Argentina and the Union of South Africa each report an increase of 200 tons over the previous season.

APRICOTS DRIED: Estimated commercial production in specified countries, averages 1936-1945, annual 1941-1947
(Rounded to nearest 100 short tons)

Year	: Argentina	: Australia	: Chile	: Spain	: Africa	: Syria	: South : total	: Foreign : total	: United States	: World total
	: Short tons	: Short tons	: Short tons	: Short tons	: Short tons	: Short tons	: Short tons	: Short tons	: Short tons	: Short tons
Average	:	:	:	:	:	:	:	:	:	:
1936-45	: a/	: 1,700	: a/	: 2,600	: 1,100	: 800	: b/6,200	: 22,000	: 1/28,200	
1941-45	: a/	: 1,700	: a/	: 4,800	: 600	: 700	: b/7,800	: 16,100	: 1/23,900	
Annual	:	:	:	:	:	:	:	:	:	:
1941	: a/	: 2,100	: a/	: 1,400	: 400	: 400	: 4,300	: 19,700	: 24,000	
1942	: 100	: 2,100	: a/	: 4,700	: 300	: 500	: 7,700	: 20,800	: 28,500	
1943	: 400	: 1,400	: a/	: 5,500	: 700	: 1,000	: 9,000	: 6,600	: 15,600	
1944	: 200	: 2,100	: 100	: 9,600	: 900	: 800	: 15,700	: 25,800	: 39,500	
1945	: 500	: 900	: 100	: 2,600	: 700	: 600	: 5,400	: 7,800	: 13,200	
1946d/	: 200	: c/ 1,400	: 100	: c/ 2,200	: c/ 100	: 600	: 4,600	: c/ 18,200	: 22,800	
1947d/	: 400	: 1,300	: 100	: 2,100	: 300	: 600	: 4,800	: e/ 15,000	: 19,800	

Compiled from trade and official sources

a/ Not available. b/ Does not include Argentina and Chile. c/ Revised.
d/ Preliminary. e/ Trade sources - not an official estimate.

Growing conditions in Spain, the most important foreign producer of this commodity, were decidedly unfavorable. In the Murcia area considerable damage was done by strong winds and rains at blossoming. The fresh apricot crop was only about 20 percent of normal. In Valencia, strong winds in May also caused considerable damage to both fruit and trees. Insect pests also are responsible for some damage to the crop in Valencia. Several days of intense heat in June caused a heavy drop of immature fruit. Mallorca was the only district in Spain to enjoy favorable growing conditions.

(Text Continued on Page 134; Table follows)

UNITED STATES: Exports of dried apricots

Year ended June 30	United Kingdom	Belgium	France	Netherlands	Sweden
	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Averages</u>					
1941/42-					
1945/46	3,392	156	49	0	55
1936/37-					
1945/46	2,465	708	1,995	677	398
<u>Annual</u>					
1940-41	4	0	0	0	51
1941-42	4,322	0	0	0	237
1942-43	3,783	0	0	0	a/
1943-44	3,704	0	0	0	40
1944-45	5,153	763	242	0	0
1945-46	a/	15	1	0	a/
1946-47 b/	35	896	1	73	277
	Norway	Denmark	Canada	Other countries	Total
	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Averages</u>					
1941/42-					
1945/46	54	a/	363	1,527	5,596
1936/37-					
1945/46	261	415	768	1,740	9,427
<u>Annual</u>					
1940-41	0	0	934	466	1,455
1941-42	0	1	1,144	1,608	7,312
1942-43	0	0	438	1,144	5,365
1943-44	0	0	130	2,163	6,037
1944-45	0	0	97	1,642	7,897
1945-46	271	0	5	1,077	1,369
1946-47 b/	0	a/	1,269	c/ 876	3,427

Compiled from official records of the Bureau of Census.

a/ Less than one-half ton.

b/ Preliminary.

c/ Includes 358 tons to Switzerland and 176 tons to Newfoundland and Labrador.

COMMODITY DEVELOPMENTS

FRUITS, NUTS AND VEGETABLESINDIA INCREASING DUTIES ON CANNED
FRUITS, JUICES AND PRESERVES

The Government of India is increasing duties on imports of canned and bottled fruits and fruit juices and jams, jellies, and marmalades to provide protection for the war-born processing industry of India.

Accepting in part the recommendations of the Indian Tariff Board, the Government has decided that protection in the first year will take the form of ad valorem duties at the rates recommended by the Board, i.e., 60 percent on canned and bottled fruits; 40 percent on fruit juices and squashes; and 80 percent on jams, jellies, and marmalades. The form of protection to be provided after the first year - whether through duties or by direct subsidies to the industry - will be determined before the end of the first year following further studies conducted by the Tariff Board.

The Government is reported also to have accepted the Tariff Board's recommendation that sugar be imported until the indigenous supply position improves so that the industry will have access to adequate supplies, but refused the request for refund of the excise duty on sugar and duty free entry of tinplate. The Government will facilitate the entry of machinery but the request for the refunding of the duty on such machinery is still under consideration.

(Continued on Page 132)

TROPICAL PRODUCTSBRAZILIAN COFFEE
STOCKS INCREASE

Two compilations of the coffee position in Brazil made by prominent Brazilians have been under discussion both of which indicate that stocks are increasing. These compilations are reproduced below:

	<u>Compilation 1</u>	<u>Bags of 132 pounds</u>
Present stocks plus 1947/48 harvest		25,000,000
Exportation	15,000,000	
Internal Consumption	2,000,000	
	<u>17,000,000</u>	<u>17,000,000</u>
Excess coffee		8,000,000

Compilation 2Bags of 132 pounds

Stocks from last years' crop not yet liberated	4,781,551
Stocks in Santos up to June 25, 1947	1,952,922
1947/48 Sao Paulo crop estimate	7,000,000
Estimate for other Brazilian states	<u>8,000,000</u>

Total 21,734,473

Probable Brazilian exports for 1947/48 (based upon the exports of the last 6 months of 1946/47)	18,000,000
Excess coffee which should exist in August, 1948 ..	<u>3,734,473</u>

Total 21,734,473

It should be noted that in Compilation 2 no provision is made for domestic consumption for the reason that it is currently being supplied from D.N.C. (National Coffee Department) stocks. No explanation is given for the small amount allowed for domestic consumption in Compilation 1. Brazilian consumption is believed to be from 3 to 5 million bags annually.

D.N.C. coffee stocks are reported officially at 4,600,000 bags. Port stocks as of June 1, 1947, were placed at 3,331,274 bags compared with 3,572,528 bags on June 1, 1946.

NETHERLANDS INDIES 1947 TEA PRODUCTION NEGLIGIBLE

Tea production in the Netherlands Indies during the current calendar year will total about 2.2 million pounds, most of which will come from estates now in Dutch possession. Before the war, the Netherlands Indies ranked third as a tea exporting area, with an average annual export (1935-39) of over 154 million pounds.

Assuming that tea estates in Java and Sumatra will be returned to the owners before the close of 1947, and that stable political conditions thereafter will prevail, authorities in the Netherlands Indies forecast tea production during the next five years as follows:

<u>Year</u>	<u>Million pounds</u>
1948	22 - 33
1949	66 - 77
1950	121 - 132
1951	154 - 165
1952	176 - 189

If estates are in possession of the owners at the end of this year, it is believed that 30 percent of the prewar acreage in Java and Sumatra (342,000 acres) will require heavy interplanting or complete replanting, 65 percent will have to be low-pruned, and the remaining

5 percent will need normal pruning. These statements are based on the assumption that the estates will suffer no further damage prior to restoration to the owners.

Factory capacity at the time of the Japanese capitulation was placed at 77 million pounds. If factories and equipment have not been damaged or destroyed since the Japanese surrender, factory capacity probably could be increased to between 176 and 198 million pounds within three years after the estates are taken over by the former operators.

GRAINS, GRAIN PRODUCTS AND FEEDS

CUBAN RICE ARRIVALS LARGEST IN 10 YEARS

Rice imports into Cuba during the 1946-47 marketing year were the largest since 1937. August-July arrivals equalled 471 million pounds, compared with 422 million in the preceding year. Of these receipts, 94 percent came from the United States. Current rice stocks on hand are considered sufficient for needs at least until October 1, when price ceilings on imported rice are to be discontinued. Increased consumption, smaller stocks, and higher consumer prices are expected before United States new-crop rice is received.

Cuba: Rice arrivals, August-July, 1946-47, with comparisons

Country or area	Average					
	1932-36	1937-41	1943-44	1944-45	1945-46	1946-47
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Orient	333	201	0	0	0	0
United States	19	232	307	339	330	444
Ecuador	0	1	86	70	56	16
Chile	0	0	28	9	13	1
Colombia	0	0	0	0	12	2
Other countries	27	1	1	0	11	8
Total	379	435	422	418	422	471

Compiled from preliminary figures of ships' manifests, except for calendar years 1932-41, for which data are official.

Harvesting of the domestic crop will begin in September and marketing in November. Growing conditions are reported poor in some Provinces and ideal in others. In western Cuba, uninterrupted rains permitted the sowing of only a small part of the intended acreage, but in the eastern Provinces, prospects are excellent for a record or near-record crop.

(Continued on Page 132)

TOBACCOCZECHOSLOVAKIA PLANS TO
USE MORE U. S. TOBACCO

Under the Two-Year Economic Plan for Czechoslovakia consumption of foreign leaf tobacco in 1947 is placed at about 22 million pounds, of which United States tobaccos would supply 8.2 million pounds, or 37 percent. This represents a considerable rise from prewar (1934-38) years, when the United States share in Czechoslovakia's tobacco imports averaged only about 2 percent, or 420,000 pounds yearly.

In 1946, Czechoslovakia imported 11.8 million pounds and the United States supplied 16 percent of this amount. Czechoslovak imports for the first quarter this year were 13.7 million pounds, of which this country supplied 1.7 million. Most of the imports consisted of Oriental leaf from Bulgaria and Turkey, and leaf from the Netherlands (presumably re-exports of United States and other tobaccos).

Recent prices paid for imported leaf by the State Monopoly were as follows: for Turkish 73 cents per pound; for United States leaf, 73 cents to 91 cents per pound; for Bulgarian 91 cents to \$1.00; and for prime quality Greek leaf \$1.09 to \$1.18 per pound. Retail prices of the popular brands of cigarettes range from 2 cents to 4 cents per piece. Cigarettes of blended United States tobaccos (80 percent) and Oriental (20 percent) leaf bring 4 cents a piece.

Domestic tobacco production in Czechoslovakia is regulated by the State Monopoly. This year's production is estimated at about 21.2 million pounds from 14,800 acres. According to present plans, 1948 plantings will about equal this year's. Most of the domestic leaf is utilized in the manufacture of pipe tobacco and smaller amounts in cigarettes. Domestic production, however, is sufficient to provide for only about 50 percent of the country's leaf requirements.

FATS AND OILSU. S. IMPORTS OF FATS
AND OILS EXCEED EXPORTS

The United States returned to its prewar position as a net importer of fats and oils during the first half of 1947. Imports of fats, oils and raw materials in terms of fat totaled more than 400,000 short tons, nearly 2.5 times the quantity imported during the first half of 1946. Exports from January through June of this year, however, were 41 percent of imports, while for the same period of 1946 exports were 121 percent of imports. This situation is due largely to increased receipts of copra from the Philippines and to smaller exports of lard.

Copra and coconut oil imports during the first six months were three times the imports for the same months of 1946 and were nearly as great as imports for the entire preceding calendar year. Imports of castor-beans and linseed oil were greater than for the similar period last year. Tung oil imports of 77 million pounds were double the quantity received during the full 12 months of 1946 and may be compared with the prewar annual average imports of 123 million pounds.

Imports of palm oil and olive oil although well above those for the same months of 1946 were only a fraction of the quantities imported prewar.

Exports for the first half of 1947 were at a rate higher than before the war and with the one exception of cottonseed oil were greater than the prewar annual average. Exports of lard, soybeans, and soybean oil were considerably less than for the January-June period of 1946, but exports of peanuts were greater.

A substantial quantity of fats and oils were re-exported during the first half of this year. Although these are not included in the statistics of imports, they do represent a considerable movement of supplies. The more important items include more than 12,000 short tons of copra, 1,290,000 pounds of tung oil, 510,000 pounds of palm oil, and 92,000 pounds of castor oil.

UNITED STATES: Imports a/ of specified oils and oilseeds,
January-June 1947 with comparison

Commodity	Unit	Average 1935-39	1946	January-June	
				1946	1947
Babassu kernels	1,000 Lbs.	b/	39,463	32,621	21,032
Babassu oil	"	c/ 346	2,314	1,278	1,036
Castor-beans	"	132,924	226,295	128,145	139,794
Castor oil	"	226	6,450	3,328	6,354
Flaxseed	Bu.	18,470	3,394	2,198	158
Linseed oil	Lbs.	713	94,405	32,698	106,545
Copra	S.T.	230	395	114	372
Coconut oil	Lbs.	348,715	2,353	908	14,891
Oiticia oil	"	c/ 7,673	22,593	6,527	6,581
Olive oil:					
Edible	"	62,811	12,660	330	4,626
Inedible	"	35,448	103	28	199
Palm oil	"	321,482	37,850	17,408	27,539
Sesame seed	"	58,425	4,891	3,859	7,166
Tea seed oil	"	13,159	88	88	5,516
Tucum kernels	"	d/ 9,810	12,709	4,389	15,267
Tung oil	"	123,190	36,207	5,991	76,968

Compiled from official sources.

a/ Imports for consumption. b/ Not separately classified in Foreign Commerce and Navigation. c/ Average of less than 5 years. d/ 1939 only.

UNITED STATES: Exports of specified fats, oils and oilseeds,
January-June 1947 with comparisons

Commodity	Unit	Average 1935-39	1946	January-June 1946		1947
				1946	1947	
Soybeans	1,000 Bu.	a/ 4,793	2,906	831		28
Soybean oil:						
Refined	1,000 Lbs.	b/ 6,467	72,583	30,494		19,052
Crude	" "		13,228	4,013		16,513
Coconut oil:						
Refined	" "	3,789	935	27		764
Crude	" "	10,442	47,366	39,823		33,922
Cottonseed oil:						
Refined	" "	4,793	5,857	828		2,420
Crude	" "	1,515	244	242		21
Linseed oil	" "	1,280	1,625	1,358		665
Peanuts:						
Shelled	" "	b/ (452	61,043	23,116		110,677
Not shelled	" "		7,066	2,707		14,015
Cooking fats	" "	2,111	11,424	5,497		2,340
Lard	" "	165,636	430,682	293,347		175,790
Oleomargarine	" "	180	50,483	20,540		12,677
Tallow:						
Edible	" "	1,651	4,151	3,529		247
Inedible	" "		6,472	4,201		18,952

Compiled from official sources.

a/ Average of less than 5 years. b/ Not separately classified in
Foreign Commerce and Navigation.

CANADIAN FLAXSEED, OTHER
OILSEED PROSPECTS GOOD

Canada expects to harvest 10.9 million bushels of flaxseed this season, according to the first official estimate. This is a crop 70 percent greater than the 6.4 million bushels (revised) of 1946. If prospects materialize, this will be the third largest crop in over 30 years, being exceeded only by the 15 and 17.9 million bushels produced in 1942 and 1943 respectively. Recent weather conditions, however, particularly in Saskatchewan and Alberta, have not been conducive to high yields. The long dry period and the high temperatures which prevailed during July resulted in some crop deterioration.

Though the area planted to flaxseed, 1.4 million acres, is slightly below indicated intentions of 1.5 million, it represents a 71 percent increase over the 1946 acreage.

Farmers' marketings for the crop year ended July 31, 1947, totaled

4,839,000 bushels compared with 4,733,000 for the same period a year ago. Stocks in store as of July 31, were reported at 346,000 bushels. The basic price for No. 1 C W flaxseed, in store Fort William - Port Arthur or Vancouver, has been \$5 per bushel since August 1, 1947. Prices were increased on February 1, 1947, from \$2.75 to \$3.25 per bushel.

The estimated 72,000 soybean acreage, all of which is in the Province of Ontario, is the largest on record for Canada. In 1946, 59,000 acres yielded 1.1 million bushels of beans. Since domestic requirements are approximately 3.5 million bushels, continued imports of substantial quantities will be necessary. The official price increase from \$2.15 to \$2.40 per bushel, established November 1946 and made retroactive for the entire 1946 crop, has been an incentive for growers to increase their acreages.

Rapeseed plantings are expected to approximate the 22,000 acres of 1946 from which a record crop of 17.6 million pounds was harvested. The entire output was grown in Manitoba and Saskatchewan. Commercial rapeseed production in Canada dates back only to 1943. The official price is 6 cents per pound with discounts for excess moisture content and admixtures of mustard seed.

Estimates of acreages planted to sunflower seed and mustard seed are not yet available. Sunflower seed production increased from 2.9 million pounds in 1945 to 13.4 million in 1946, of which 13.0 million pounds were grown in Manitoba, and the remainder in Saskatchewan. Beginning August 1, official prices increased from 5 to 6 cents per pound for the "Sunrise" variety. The "Mennonite" type brings only 5 cents per pound for seed in reasonably clean condition.

Mustard seed output came to 9.5 million pounds from 26,500 acres during 1946. This oilseed crop is produced in the Province of Alberta. Canada's first commercial crop was reported in 1945 when only 4 million pounds were produced.

BRAZIL'S OITICICA CROP SMALLEST ON RECORD

Brazil's 1947 oiticica crop (harvested December-March) was the smallest on record, only 4,400 tons, from the four important producing states, yielding about 1,300 tons of oil.

The 1948 crop is expected to be considerably larger, although it is as yet too early to estimate how closely it will approach the normal production of 33,000 tons of seed (10,000 tons of oil). Production is unsteady and unpredictable even though all weather factors may be favorable.

Lack of transportation from the interior has retarded the crushing

of the 1947 crop. Even the 1945 crop has not been entirely crushed, as part of it is still at the producing centers.

Estimates indicate that the stock of oil available for export is fairly large. Approximately 5,000 tons are said to be stored in Fortaleza and probably 660 tons more will be crushed and available for export in about 30 days.

FRENCH OILSEED OUTPUT DOWN

Preliminary estimates indicate that France's oilseed output for 1947 will amount to about 87,000 short tons, a 42 percent decrease from last year's revised figure of 150,000 tons. The greatest decline occurred in the rapeseed crop, the area of which dropped from 312,000 acres in 1946 to 131,000 this year, with the corresponding production decrease from 115,000 to 40,000 tons. Fall sown rapeseed was severely damaged by winter freezes, and plantings entirely destroyed were not resown to spring rape. Some stands, at first believed saved from destruction, were later fed green to livestock when it became evident they would not be worth harvesting. Insect attacks have also caused considerable damage.

Though all vegetable oil crops were greatly increased in France during the war years, rapeseed seems to be the only one with yields sufficiently high and stable to permit economical production. The exceptionally large rapeseed harvest of 1946 was over 575 percent greater than the 1930-39 average.

Poppy seed and sunflower seed crops, 4,000 and 7,000 tons, respectively, are down over 20 percent from last year's harvests. The 1947 production of other types of oilseeds, however, will probably be materially greater than in 1946. A substantial increase in the plantings of mustard and camelina (German sesame), in particular, has been reported.

France: Oilseed acreage and production, 1946 with comparisons

Year	Rapeseed:	Poppy seed:	Sunflower seed:	Others	Total
Area	Acres	Acres	Acres	Acres	Acres
Average 1930-39	33,754	442	a/	a/	34,196
1946	312,339	20,195	26,306	93,089	451,929
1947 b/	131,311	16,519	19,091	144,951	311,872
Production	Short tons	Short tons	Short tons	Short tons	Short tons
Average 1930-39	16,904	179	a/	a/	17,083
1946	114,569	5,569	9,506	20,119	149,763
1947 b/	40,242	4,444	7,391	34,935	87,012
American Embassy, Paris. a/ Not available. b/ Preliminary.					

JULY PHILIPPINE COPRA EXPORTS INCREASE

Philippine copra exports for July totalled 63,774 short tons, which is an improvement over the 36,000 tons for June but still considerably below the average monthly shipments of 86,782 tons for the first six months of 1947. Total exports for the period January-July 1947 were 584,000 tons. The smaller shipments over the past two months have largely been the result of buyers resistance both in the United States and Europe and not a question of production capacity. If buying and selling prices remain fairly stable, then exports for the remainder of 1947 may be expected to approach the higher rate of the spring months. Current export prices from the Philippines are around \$135 per short ton c.i.f. Pacific Coast and \$146 on the Atlantic. Buying prices for 100 kilos of copra range from about \$10.50 in the remote producing areas to \$13.00 in Manila.

COTTON AND OTHER FIBERS

COTTON-PRICE QUOTATIONS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices of certain foreign growths
and qualities in specific markets

Market location, kind, and quality	Date 1947	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good.....	8-14	99.05 lbs.	Tallari	42.25	35.21
Ashmouni, F.G.F.....	"	"	"	41.00	34.17
Giza, 7, Good.....	"	"	"	(not quoted)	
Giza 7, F.G.F.....	"	"	"	(not quoted)	
Karnak, Good.....	"	"	"	46.25	38.55
Karnak, F.G.F.....	"	"	"	41.50	34.59
Bombay		Candy			
Jarila, Fine.....	"	784 lbs.	Rupee	432.00	16.62
Broach, Fine.....	"	"	"	537.00	20.67
Sind American, Fine.....	"	"	"	540.00	20.78
Punjab " 289-F, Fine:	"	"	"	626.00	24.09
Kampala, East African.....	"	"	"	920.00	35.40
Buenos Aires		Metric ton			
Type B.....	8-16	2204.6 lbs.	Peso	2590.00	34.93
Lima		Sp. quintal			
Tanguis, Type 5.....	"	101.4 lbs.	Sol	169.00	25.64
Pima, Type 1.....	"	"	"	(not quoted)	
Recifo		Arroba			
Mata, Type 5.....	8-15	33.07	Cruzeiro	105.00	17.27
Sertao, Type 5.....	"	"	"	105.00	17.27
Sao Paulo					
Sao Paulo, Type 5.....	"	"	"	157.50	25.91
Torreon		Sp. quintal			
Middling, 15/16".....	"	101.4 lbs.	Peso	130.25	26.44

Compiled from weekly cables from representatives abroad.

LARGER JUTE CROP FORECAST IN INDIA

The planting of an actual area of 2,569,000 acres of jute with a possible production of 3.6 billion pounds of fiber are expected in India this year, according to the preliminary forecast. This estimate is greater than the 1946 crop by approximately 37 percent in area and 62 percent in production.

In Bengal, the largest producing area, 2,657,000 acres were licensed for the 1947 crop, but only about 2,152,000 acres are expected to be actually planted. Total jute area in India, consequently, is expected to be only about 2,569,000 acres compared with a possible 3,074,000 acres. In 1946, actual acreage was 1,880,000 acres compared with the preliminary estimate of 2,388,000 acres based on total planting of the licensed acreage. The estimated actual acreage for 1947 based on the preliminary forecast is about 77 percent of the 1941 final acreage estimate. Planting to jute of less than the licensed area during recent years is due principally to the need for food crops.

The crop of 1947 may, however, considerably exceed both the 1941 and 1946 crops. Weather conditions are now favorable after a short period of drought at planting time. If Bengal yields are favorable at 3-1/2 bales (of 400 pounds each) per acre and yields in other provinces are average, a total of 3.6 billion pounds of jute fiber may be realized this year, compared with 2.22 billion in 1946 and 2.19 billion in 1941, the year on which the areas of production are calculated for purpose of licenses.

Quotas allotted to the United States for the year ended June 25, 1948, have been set by the Indian Government at 90,000 long tons of raw jute and 300,000 long tons of jute goods. Average imports of jute into the United States during 1935-39 were about 68,853 long tons of jute and jute butts, and 286,029 long tons of manufactures.

LIVESTOCK AND ANIMAL PRODUCTS

SAO PAULO CATTLE MARKETINGS INCREASE, WHILE CONTROLS CONTINUE

Sao Paulo, Brazil reports considerably more cattle marketed during the first quarter of 1947 than in the same period a year earlier. Cattle slaughter under Federal inspection totalled 231,418 head for January - March 1947 as compared with 186,935 head for the first quarter in 1946.

The increased marketings were due largely to exceptionally high prices. Fat steers, during this period, averaged cr. \$10.00 per arroba (about 1 2/3 cents per pound) above prices for corresponding periods in 1945 and 1946.

Shortage of cattle cars is limiting the movement of cattle to slaughter houses, but this situation is reported to have shown a definite improvement in comparison with a year ago. Cattle are now reaching the market in much better condition than in the previous season, owing to unusually heavy rainfall from October to March which resulted in exceptionally luxuriant pastures. The average dressed weight of slaughtered animals is slightly higher than in 1946.

Beef still continues to be rationed with retail sales restricted to three days a week. Slaughter quotas for xarqueadas (producers of jerked beef) and distribution quotas for packing houses, as well as weekly allotments of fresh meat for cities and towns, are other controls still effective.

NETHERLANDS MILK PRODUCTION AFFECTED BY DRY WEATHER

Milk production in many areas of the Netherlands dropped sharply in the last half of July as a result of the prolonged dry spell. One of the warmest and driest summers on record, following close upon a severe winter, took its toll of both pastures and crops. In the important dairying district of Friesland, it is estimated that milk production has declined seasonally about 15 percent more than normal, while in Groningen, the decline is estimated to be as much as 40 percent. In the south and southeast, where conditions are particularly severe, it is reported that barn feeding has already started, which will further reduce the limited hay supply.

UNITED KINGDOM ANNOUNCES WINTER RATIONS FOR LIVESTOCK

The United Kingdom recently announced that there would be an improvement in basic feed rations for pigs and poultry, and that rations for dairy cows would be maintained at levels established during the latter part of last winter. This improvement has been made possible largely because of an expected increase in the supply of cereal feeds. Supplies of oilcakes and other protein feeds, on the other hand, have not improved to the same extent, owing to world shortage of oilseeds.

From September to April basic rations for commercial pigs and poultry at the rate of one unit per pig and one unit for every 20 head of poultry per month will be allowed for one-fifth of the registered numbers kept on the holding in June 1939, or December 1940 instead of the current one-sixth, or last winter's one-eighth. Deducting for size of holdings were at the same time liberalized. There is also to be a special allowance for hill ewes.

The Ministry has indicated that an early and substantial increase in the production of eggs and pig meat is necessary in the interest of

good farming, to the national diet and to conserving foreign exchange.

FRUITS, NUTS AND VEGETABLES
(Continued from Page 121)

CANADIAN-UNITED STATES
APPLE COMMITTEE MEETS

The Canadian and United States Departments of Agriculture announced on August 18 the conclusions reached at a meeting of the Canada-United States Joint Apple Committee held in Detroit, Michigan, August 15-16, regarding the marketing of Canadian apples in the United States during the 1947-48 season.

The plan, arrived at after full discussion of the 1947 supply and marketing prospects of the two countries, provides for the marketing in the United States of Canadian apples totaling 3.5 million bushels, including up to 65 percent or 2,275,000 bushels of packed apples, the balance for processing.

The Canadian representatives stated that off-shore export sales in excess of 300,000 bushels would correspondingly reduce the total of packed apples expected to be marketed in the United States. Their calculated exports of 300,000 bushels are based upon the assumption that the United Kingdom will not purchase Canadian apples during the 1947-48 marketing season, because of the shortage of Canadian dollars in Britain. Also, the British apple crop is reported to be very large this season.

During the 1946-47 season, the British Ministry of Food purchased 4.5 million bushels of packed fresh apples from Canada and about 500,000 bushels of Canadian apples were processed to meet a contract with the Ministry for canned apples.

During the 1946-47 season about 1 million bushels of Canadian apples were exported to the United States, about 60 percent as packed apples for fresh use, and 40 percent for processing. In turn, the United States exported about 400,000 bushels to Canada.

GRAINS, GRAIN PRODUCTS AND FEEDS
(Continued from Page 123)

CANADIAN GRAIN CROP
BELOW AVERAGE

Canada's 1947 grain production will be considerably smaller than the average of recent years, according to the first official estimate.

That estimate, which was issued a month earlier than usual, places

the wheat crop at 359 million bushels compared with the average of 443 million bushels for 1939-43 and the 1946 production of 421 million bushels. Earlier prospects had been for a crop approaching last year's level. Deterioration from drought and excessive heat, however, reduced yields, which are now forecast at about 15 bushels per acre, compared with the revised yield of 17.5 bushels for 1946 and the long-time average of 16 bushels per acre.

Lowered yields were attributed mainly to extended drought and high temperatures over wide areas of the wheat belt. The largest percentage decline in yields, compared with those of a year ago, are reported for Alberta and Manitoba. In Saskatchewan, the remaining Province of the three principal producers, yields are generally lower than in Manitoba and Alberta, but they appear to have held up better than in the other two Provinces, despite extensive drought reported. Wheat acreage for Canada is now estimated at 23.9 million acres, or only slightly less than the revised 1946 acreage.

Production of oats is forecast at 292 million bushels or 27 percent below the 1946 outturn. The decline is caused by reductions in both acreage and yields, this year's yields averaging about 20 percent less than in 1946 and the 1939-43 average. The barley crop, tentatively placed at 155 million bushels, is only slightly smaller than last year's harvest. A substantial increase in acreage largely offset the reduction in yields, now estimated to be 20 percent below 1946 yields. More than 90 percent of the barley crop is produced in the Prairie Provinces. Substantial increases in acreage are reported for each of these Provinces, but lowered yields will result in a slightly smaller outturn, according to present prospects.

Total rye production is forecast at about 15 million bushels, more than double the 1946 crop. Increased seedings of both fall and spring rye, together with a substantial increase in yields for the important fall variety, are the principal factors in the gain.

Latest releases report that rains were delaying harvesting operations in mid-August, and damage from sprouting was feared in southern parts of Manitoba. Crop development in other areas was less advanced and there was, therefore, less danger of damage from the wet conditions.

The rains were benefiting late-sown grains, especially in northern areas. The condition of these crops on July 31, expressed in percentage of the long-time average yield per acre, was reported as follows, with the comparable 1946 figure in parentheses: Mixed grain 73 (93); buckwheat 89 (86) and shelled corn 65 (91).

CANADA: Grain acreage, yield per acre, and production, 1947
with comparisons

Year	Wheat	Rye	Oats <u>a/</u>	Barley
	1,000 <u>acres</u>	1,000 <u>acres</u>	1,000 <u>acres</u>	1,000 <u>acres</u>
Acreage <u>b/</u>				
Average 1939-43:	23,160	1,002	13,309	5,873
1944	23,284	648	14,315	7,291
1945	23,414	487	14,393	7,350
1946	24,076	715	12,075	6,258
1947 <u>c/</u>	23,875	1,156	11,150	7,441
Yield per acre	<u>Bushels</u>	<u>Bushels</u>	<u>Bushels</u>	<u>Bushels</u>
Average 1939-43	19.1	14.5	33.1	27.0
1944	17.9	13.2	34.9	26.7
1945	13.1	12.1	26.5	21.5
1946	17.5	10.4	33.1	25.5
1947 <u>c/</u>	15.0	12.9	26.2	20.8
Production	1,000 <u>bushels</u>	1,000 <u>bushels</u>	1,000 <u>bushels</u>	1,000 <u>bushels</u>
Average 1939-43	443,356	14,577	440,897	158,537
1944	416,635	8,526	499,643	194,712
1945	305,912	5,888	381,596	157,757
1946	420,725	7,448	400,069	159,887
1947 <u>c/</u>	358,786	14,906	291,620	154,554

From reports of the Dominion Bureau of Statistics.

a/ Production and yield in bushels of 34 pounds.

b/ Acreage for 1946 revised on the basis of preliminary census figures; 1947 acreage in Prairie Provinces and Ontario from June Survey of grain acreage. Acreage for other Provinces (1947) from the Intentions Survey of April 30.

c/ Preliminary estimate.

WORLD APRICOT PACK SLIGHTLY SMALLER THAN IN 1946

(Continued from Page 119)

Growing conditions in the other countries were generally favorable. The small increases or decreases in output were due to the demand, or lack of demand, for fresh apricots for other disposition, such as fresh consumption or canning.

As the new crop pack came in, only Spain reported a carry-over from previous seasons. The carry-over for Spain was estimated at 2,400 short tons, of which 1,300 tons were in Murcia, and the balance in Valencia. The dried cots are reported to be an accumulation of several previous seasons, and for the most part in poor condition and

not readily acceptable by foreign buyers.

Quantitative export data for the six foreign producing countries is not available, but exports were very limited. Argentina exported a few, as did Australia. Spain disposed of a small tonnage, though export prices were considered too high by most foreign buyers. United States exports during the 1946-47 season totalled 3,427 tons. Domestic consumption in the producing countries accounted for practically 90 percent of the disposal of the 1946 pack.

Disposal of the 1947 pack is expected to follow closely that of 1946. In the Southern Hemisphere countries, trade sources indicate that for all practical purposes the harvest of this year has been moved into consumption channels, mostly the domestic market. The Syrian output is expected to be sold in the domestic market, with possibly very modest quantities finding their way to France, and nearby countries.

In Spain, the trade reports higher prices than last season, and practically no foreign interest has been reported to date. Some more optimistic members of the trade feel that it might be possible to work out compensation agreements with the United Kingdom, Belgium and Switzerland, but as of this writing nothing has been accomplished in this connection. The shortage of exchange in many of the principal buying countries may result in Spain either lowering her prices to much lower levels, or having a sizable carry-over next year.

L A T E N E W S

(Continued from Page 116)

of old crop cotton are mostly in possession of mills, as dealers generally liquidated their stocks during recent months when prices were relatively high.

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The first Egyptian cotton report places the 1947 acreage at 1,302,000 acres, compared with a first estimate for 1946 of 1,242,000, and a final estimate of 1,258,000 acres. The 1947 estimate includes 396,000 acres of extra long staple varieties (350,000 of which is Karnak), 23,000 of medium long staple, and 882,000 of Ashmouni and Zagora. These figures represent a decrease of about 59 percent from last year acreage in extra long staples, and an increase of 216 percent for the shorter staple Ashmouni and Zagora.

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Cotton consumption in Canada during the 11 months ended June 30, 1947 totalled 340,000 bales (of 500 pounds gross) compared with 366,000 bales for a similar period last year.

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Cotton stocks in Spain at the end of June amounted to only

3,100 bales (of 500 pounds gross) exclusive of very small mill stocks. These stocks were equal to about a week's mill requirements at the present low rate of consumption.

Imports in June amounted to only 13,200 bales (500 pounds gross), all from India. Arrivals in July totalled 34,800, including 19,900 bales from Brazil, 7,100 from India and 7,800 from Egypt. The supply situation appeared considerably improved until 18,700 bales were destroyed by fire in the Free Port on July 3. All of it was reported to be still on consignment and covered by insurance.

Distribution by the Government of raw cotton to the mills in June totalled only 11,800 bales. Half of the spinning mills were closed and the others operated on a six-day, two-shift basis. Ten percent of the weaving mills operated on a four-day, one-shift basis, 20 percent (those producing for export) operated four days a week on a two-shift basis. The remaining 70 percent of the mills did not operate.

Preliminary data indicate a total of 169,000 bales of cotton were imported during the 12 months ended July 31, 1947. No new purchase contracts were pending as of July 21.

Spanish cotton growers were authorized to plant 110,000 acres this year, but planted only 60 percent of that area. Production is not expected to exceed 15,000 bales.

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Hog numbers in Denmark, according to the July 26 census, showed an increase over a year ago in all classes, except slaughter hogs. Hogs of all classes totalled 1,823,000, compared with 1,768,000 a year previous. Hog numbers by classes follow, with July, 1946 census totals in parentheses: Sows, 208,000 (191,000), of which bred sows numbered 129,000 (120,000); suckling pigs 443,000, (377,000), and pigs and slaughter hogs 1,163,000, (1,192,000).

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Finland has announced that price controls on processed meat have been abolished.